

**1A Nellie Mae Eldridge (Estate) Case No. 05CEPR00552****Atty Milnes, Michael A. (for Judy Riley – former Executor/Petitioner)****First and Final Acct. and Report of Former Executor and Petition for its Settlement, and  
Petition for Approval of Preliminary Distribution**

<b>DOD: 06/13/03</b>	<b>JUDY RILEY</b> , former Executor, is Petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  1. Petitioner states that the only asset of the estate was real property; however, no Inventory & Appraisal has been filed. Need Inventory & Appraisal.  2. Need <i>Notice of Hearing</i> .  3. Need proof of service by mail at least 15 days before the hearing of <i>Notice of Hearing</i> .  4. Need Order.
	Account period: <b>09/06/05 – 07/15/14</b>	
	Accounting - <b>\$140,531.12</b>	
	Beginning POH - <b>\$140,000.00</b>	
	Ending POH - <b>\$0.00</b>	
<b>Cont. from</b>	Executor - <b>waived</b>	
<b>Aff.Sub.Wit.</b>	Attorney - <b>waived</b>	
✓ <b>Verified</b>		
<b>Inventory</b> x		
<b>PTC</b> x		
✓ <b>Not.Cred.</b>		
<b>Notice of Hrg</b> x	<b>Petitioner states</b> that the only asset of the estate was real property appraised at \$140,000.00. Petitioner states that the real property was sold on 09/20/05 and the proceeds of the sale were distributed in equal shares to the heirs, pursuant to decedent's will, as follows:	
<b>Aff.Mail</b> x	Glenn Milliorn - \$17,082.06	
<b>Aff.Pub.</b>	Robert Milliorn - \$17,082.06	
<b>Sp.Ntc.</b>	Roger Milliorn - \$17,082.06	
<b>Pers.Serv.</b>	Kathy Jones - \$17,082.06	
<b>Conf. Screen</b>	Judy Riley - \$17,082.08	
<b>Letters</b> 09/06/05		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>	<b>Petitioner prays for an Order that:</b>	
<b>CI Report</b>	1. The First and Final Account of Petitioner be settled, allowed and approved as filed;	
✓ <b>9202</b>	2. All acts and proceedings of the Petitioner as Executor be confirmed and approved; and	
✓ <b>Order</b>	3. For such other orders the Court considers proper.	
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b> n/a		
		<b>Reviewed by:</b> JF
		<b>Reviewed on:</b> 04/16/15
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 1A - Eldridge</b>

**1A**

**(1) Petition for Settlement of Eighth Account Current and Report of Trustee and  
(2) Approval of Trustee and (3) Attorney's Fees and Costs**

		<p><b>BANK OF THE WEST</b>, Trustee without bond, is Petitioner.</p> <p><b>Account period: 1/1/13 – 12/31/14</b>  Accounting: \$707,646.86  Beginning POH: \$420,233.74  Ending POH: \$478,213.62  (\$45,251.75 cash, residence, wheelchair, laptop, lien on van, mutual funds, annuities)</p> <p><b>Trustee: \$250.00</b> for preparation of this account</p> <p><b>Trustee:</b> Ratification of compensation paid on a monthly basis during this account period totaling <b>\$6,262.61</b> (1.30% - See Note #1)</p> <p><b>IBAR:</b> Ratification of compensation paid on a monthly basis during this account period totaling <b>\$6,012.70</b> (.75% market value excluding annuities. See time log including 43.8 hours representing most, but not all, time spent during the account period.)</p> <p><b>Attorney: \$4,957.00</b> (pursuant to separate fee declaration, for 5.6 attorney hours @ \$335/hr and 24.70 paralegal hours @ \$100-140/hr)</p> <p><b>Costs:</b> \$200.00 (filing fee)</p> <p><b>Petitioner requests an order:</b></p> <ol style="list-style-type: none"> <li>1. Settling, allowing and approving the account and ratifying, confirming and approving all acts and transactions of Petitioner relating to the account;</li> <li>2. Allowing compensation to Petitioner of \$250 for preparation of this account;</li> <li>3. Ratifying compensation paid to Petitioner of \$6,262.61;</li> <li>4. Ratifying compensation paid to IBAR of \$6,012.70;</li> <li>5. Authorizing continued payment to IBAR at the same rate as currently being charged;</li> <li>6. Authorizing payment to Dowling Aaron Incorporated for fees and costs totaling \$4,957.00 plus \$200.00;</li> <li>7. Allowing Hector Medina to continue to receive payments for attendant care with said aggregate cap to increase by 3% per annum;</li> <li>8. Appointment of Angelica Medina (Shyann's sister) as the replacement member to the Trust Advisory Committee, since Elia Medina has passed away;</li> <li>9. That no bond be required of Petitioner; and</li> </ol> <p>For such other and further orders as this Court may deem proper.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b><u>SEE ADDITIONAL PAGES</u></b></p>	
	<b>Aff.Sub.Wit.</b>			
✓	<b>Verified</b>			
	<b>Inventory</b>			
	<b>PTC</b>			
	<b>Not.Cred.</b>			
✓	<b>Notice of Hrg</b>			
✓	<b>Aff.Mail</b>			w
	<b>Aff.Pub.</b>			
	<b>Sp.Ntc.</b>			
	<b>Pers.Serv.</b>			
	<b>Conf. Screen</b>			
	<b>Letters</b>			
	<b>Duties/Supp</b>			
	<b>Objections</b>			
	<b>Video Receipt</b>			
	<b>CI Report</b>			
✓	<b>2320(c)</b>			
✓	<b>Order</b>			
	<b>Aff. Posting</b>			
	<b>Status Rpt</b>			
	<b>UCCJEA</b>			
	<b>Citation</b>			
	<b>FTB Notice</b>			

**Reviewed by:** skc

**Reviewed on:**  
4/17/15

**Updates:**

**Recommendation:**

**File 2 - Lopez**

**Page 2 – NEEDS/PROBLEMS/COMMENTS**

1. Petitioner states at #6 that the trustee fees are computed according to Petitioner's fee schedule at 1.30% of the market value of the trust assets. Need clarification, as it does not appear that the Court authorized an increase from 0.75%.
2. The IBAR declaration includes various line items indicating that one of the family members requested that the Trustee, Bank of the West, resign, but Bank of the West "refused" to resign. The Court may require clarification regarding the situation.
3. The Court authorized the purchase of a new vehicle on 7/7/11; however, a new vehicle has not yet been purchased. The Court may require clarification regarding the status of the old vehicle. Does the 1997 van continue to meet the beneficiary's needs?
4. Disbursements Schedule indicates \$26,143.75 for repairs to the residence. The schedule states driveway and siding repairs. The Court may require clarification regarding these expenditures.
5. Disbursements include \$400/month paid to Elia Medina FBO Shyann as a monthly "allowance." The Court may require clarification or accounting as to how these funds are used, as there are no other expenditures noted on the beneficiary's behalf, other than upkeep of the residence.

Attorney  
AttorneyAlexander, Thomas M., Jr. (for Former Administrator)  
Kruthers, Heather H. (for Public Administrator)

## Probate Status Hearing Re: Status

<b>DOD: 7/27/05</b>	<b>PUBLIC ADMINISTRATOR</b> was appointed Successor Administrator on 1/20/15. Letters issued 2/5/15.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
<b>Aff.Sub.Wit.</b>	<b>History: JEFFREY MCCLAY</b> , Son, was appointed Administrator with Full IAEA with bond of \$252,000.00 on 5/23/06. Bond was filed and Letters issued 8/31/06. I&A filed 2/7/07 indicated residential real property valued at \$300,000.00.	
<b>Verified</b>		
<b>Inventory</b>		
<b>PTC</b>	On 5/10/07, a Request for Special Notice was filed by Probate Referee Steven Diebert. On 10/12/07, a Creditor's Claim of \$1,105.65 was filed by Cancer Care Associates of Fresno. There was no further activity in the estate the Court set the matter for status hearing in 2013.	
<b>Not.Cred.</b>		
<b>Notice of Hrg</b>		
<b>Aff.Mail</b>		
<b>Aff.Pub.</b>	On 9/10/14, Attorney Alexander filed a petition for final distribution on behalf of his absconded client pursuant to Probate Code §10953(c). The petition indicated that the Administrator borrowed a sum of money to satisfy obligations and expenses of the estate, secured by the real property, and intended to make a distribution to his sister, make necessary repairs, and assume the loan after closing. The attorney was unaware whether any distribution of loan proceeds was made, whether any payment to the sister was made, or whether any repairs were made on the residence. The attorney requested surcharge of the Administrator to the extent of any breach of fiduciary duty, etc., and also requested statutory and extraordinary attorney's compensation.	
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<b>Letters</b>		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>		
<b>Order</b>		
<b>Aff. Posting</b>	<b>Minute Order 1/20/15 states:</b> The Court removes Jeffrey McClay and appoints the Public Administrator in order for them to pursue surcharging Mr. McClay on the bond. Tracy Stevenson requests time to have subpoenas issued and gather information. The Public Administrator is to submit a written status report for the 4/21/15 hearing.	<b>Reviewed by:</b> skc
<b>Status Rpt</b>		<b>Reviewed on:</b> 4/16/15
<b>UCCJEA</b>		<b>Updates:</b>
<b>Citation</b>		<b>Recommendation:</b>
<b>FTB Notice</b>	<b>Status Report Re Estate Assets filed 4/14/15 by Public Administrator states</b> Deputy PA Noe Jimenez spoke with Mr. Alexander, who believed that the only asset, the residence, was lost to foreclosure. He later found out that Mr. McClay may have benefitted from a loan he secured against the residence – a line of credit for \$120,000.00 on the house in 2007. It appears he pulled all the credit line money out, and the residence was sold at a trustee sale in 2010 for \$155,000.00. Mr. Jimenez believes he has found an accurate address for Mr. McClay in Sacramento, CA. The PA and counsel agree that Mr. McClay should be surcharged the full amount of the property listed on the I&A, \$252,100 of which should be paid by the bond company, less any amounts that the company can recover or show were paid to benefit the estate.	<b>File 3 - McClay</b>

**Amended First Account and Report of Trustee of Edward Crable Special Needs Trust; Amended Petition to Settle Account**

<b>Age: 18</b>		<b>PATTI CRABLE</b> , trustee, is petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b> <b>CONTINUED FROM 03/03/15</b> <b>Minute Order from 03/03/15 states: Counsel is appearing via CourtCall. Counsel is directed to communicate with the examiner. If everything is resolved after further communication with counsel, the examiner is to provide the file to the Court for review and possible approval.</b>  <b>As of 04/16/15, nothing further has been filed.</b> 1. There appears to be an addition error in the accounting and it does not balance. Further, it does not appear that the ending balance on hand is correct, as the bank statement attached to the Supplement filed 12/03/14 indicates that the balance is \$9,251.55 and not \$9,250.00 as stated on the Summary of Account. Also, the figures on the Summary of Account do not match the Summary on page 3 of the Supplement. Need revision/clarification. 2. The account indicates that the trust disbursed \$10,000.00 to the Leigh Law Group for legal services that resulted in the beneficiary being placed in a private out of state school valued at over \$50,000.00 that was paid for by the school district. Declaration of Jay Jambeck indicates that the placement was essential to the well-being of the beneficiary and the family agreed to pay the fees from the Special Needs Trust. However, it does not appear that a court order was obtained authorizing the payment and it is unclear whether this type of expenditure was authorized by the Trust instrument without a Court order. The court may require more information /authority for this expenditure. Further Notice of Hearing to the bonding company (International Fidelity Insurance Company) may be required. 3. Need Order.
		Account period: <b>09/25/12 – 08/15/14</b>	
		Accounting - <b>\$19,250.00?</b>	
		Beginning POH - <b>\$0.00</b>	
		Ending POH - <b>\$9,250.00</b>	
<b>Cont. from 011315, 030315</b>			
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>	Trustee - <b>not addressed</b>	
<input checked="" type="checkbox"/>	<b>Verified</b>	Attorney - <b>not addressed</b>	
<input type="checkbox"/>	<b>Inventory</b>		
<input type="checkbox"/>	<b>PTC</b>		
<input type="checkbox"/>	<b>Not.Cred.</b>	Bond is currently filed in the amount of \$11,000.00, petitioner is requesting that bond be reduced to zero because the remaining assets of the Trust are held in a blocked account.	
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>		
<input checked="" type="checkbox"/>	<b>Aff.Mail</b>	w/o	
<input type="checkbox"/>	<b>Aff.Pub.</b>		
<input type="checkbox"/>	<b>Sp.Ntc.</b>		
<input type="checkbox"/>	<b>Pers.Serv.</b>		
<input type="checkbox"/>	<b>Conf. Screen</b>		
<input type="checkbox"/>	<b>Letters</b>		
<input type="checkbox"/>	<b>Duties/Supp</b>		
<input type="checkbox"/>	<b>Objections</b>		
<input type="checkbox"/>	<b>Video Receipt</b>		
<input type="checkbox"/>	<b>CI Report</b>		
<input type="checkbox"/>	<b>9202</b>		
<input type="checkbox"/>	<b>Order</b>	x	
<input type="checkbox"/>	<b>Aff. Posting</b>		
<input type="checkbox"/>	<b>Status Rpt</b>		
<input type="checkbox"/>	<b>UCCJEA</b>		
<input type="checkbox"/>	<b>Citation</b>		
<input type="checkbox"/>	<b>FTB Notice</b>		

<b>Reviewed by:</b> JF
<b>Reviewed on:</b> 04/16/15
<b>Updates:</b>
<b>Recommendation:</b>
<b>File 4 - Crable</b>

Atty Janian, Paulette (for Administrator Jim D. Reis)

## Probate Status Hearing Re: Disposition of the Reserve

<b>DOD: 5/22/12</b>	<b>JIM D. REIS</b> is Administrator.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
	On 1/20/15 the Court approved the First and Final Report of Administrator . . . and for Final Distribution.	
<b>Cont. from</b>		
<b>Aff.Sub.Wit.</b>	The order included a \$5,000.00 closing reserve.	
<b>Verified</b>		
<b>Inventory</b>		
<b>PTC</b>	<b>Minute Order dated 1/20/15</b> set this status hearing for the filing of an informal accounting for the closing reserve.	
<b>Not.Cred.</b>		
<b>Notice of Hrg</b>		
<b>Aff.Mail</b>	<b>Status Report filed on 4/9/15</b> states the fiduciary income tax returns for the estate are in the process of being prepared.	
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>	Until the tax returns have been completed, reviewed, signed, taxes paid and returns filed, the \$5,000 withheld from distribution will be held in the estate account.	
<b>Letters</b>		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>		
<b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		
		<b>Reviewed by: KT</b>
		<b>Reviewed on: 4/17/15</b>
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 5 - Reis</b>

<b>DOD:5-12-13</b>	<b>ROSANNA TOROSIAN</b> was appointed Administrator with Limited IAEA on 8-6-13. Letters issued 8-30-13.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
<b>Cont from 100314, 121714</b>		
<b>Aff.Sub.Wit.</b>		
<b>Verified</b>		
<b>Inventory</b>		
<b>PTC</b>		
<b>Not.Cred.</b>		
<b>Notice of Hrg</b>		
<b>Aff.Mail</b>		
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<b>Letters</b>		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>		
<b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		

  

<p>At the hearing on 8-6-13, the Court set this status hearing for the filing of the first account or petition for final distribution.</p> <p><b>Status Report filed 10/01/14 states:</b> The beneficiaries of the estate are all non-residents of the United States and are represented by Stefano Abbasciano, Esq. of Walnut Creek, CA. The Administrator filed a Creditor's Claim with the Court on or about 11/26/13. An Objection to her creditor's claim was filed 02/19/14 by the heirs represented by attorney Abbasciano. A Mutual Compromise and Settlement Agreement has been agreed upon between Ms. Torosian and the heirs of the estate. Said settlement agreement is now being circulated for signature among Ms. Torosian and the heirs. All other matters of probate have been resolved and it is anticipated that once the settlement agreement is approved a First and Final Account and Report of the Estate can be filed, a hearing set and the Estate distributed. A 90 day continuance is requested.</p> <p><b>Status Report filed 12/11/14 states:</b> The Settlement Agreement had to be circulated among heirs in Italy and has taken substantial time to complete, but has now been executed by all parties and provided to Attorney Bagdasarian for incorporating into the final report. An additional 60 days is requested.</p> <p><b>On 2-10-15, a Corrected Final I&amp;A and Notice of Proposed Action were filed; however, no current status report has been filed.</b></p> <p><b>Status Report filed 2-10-15 by Attorney Bagdasarian (not verified) states:</b> It has been determined that it would be in the best interests of all beneficiaries who are residents of the Country of Italy that all assets including securities and bonds held by the Administrator be sold. Notice of Proposed Action has been provided, and if no objections are received, the Administrator intends to sell said securities and bonds and incorporate same into the first and final account. 60 days is requested for the filing of the first and final account.</p>	<p><b>Minute Order</b> <b>2-17-15:</b> If petition is filed by 4-17-15, no appearance necessary on 4-21-15.</p> <p>1. Need first account or petition for final distribution.</p> <p><b>Note:</b> The Administrator Rosanna Torosian filed a Creditor's Claim in the amount of \$59,668.00 on 11-26-13. A Request for Special Notice has been filed by Attorney Mark A. Blum, attorney for Rosanna Torosian as creditor of the estate.</p> <p><b>Reviewed by:</b> skc</p> <p><b>Reviewed on:</b> 4-16-15</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b> <b>File 6 - Otrakjian</b></p>
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Atty Bagdasarian, Gary G. (for Maler Ali Tareb – Administrator)

Status Hearing Re: Filing of the First Account and/or Petition for Final Distribution

<b>DOD: 08/14/11</b>		<p><b>MALER ALI TAREB</b>, son, was appointed as Administrator on 07/03/13. Letters of Administration were issued on 07/03/13.</p> <p>Final Inventory &amp; Appraisal filed 07/15/13 - \$85,000.00</p> <p><b>Status Report</b> filed 04/10/15 states: the sole asset of the estate is real property located on S. Winery in Fresno. The Administrator has been working with Wells Fargo Bank on adjusting the loan amount secured by the real property in order to allow a sale of the property in an amount that would benefit the estate. Currently, the Administrator is asking Wells Fargo to reconsider their position in connection with the modification on the loan based on updated financial information which would be provided to them. It is believed that it will take between 120 and 150 days to have the decision from Wells Fargo. Consequently, request is made that a 150 day continuance be granted in this matter so that the modification with Wells Fargo Bank can be completed and a petition for the approval of a sale of the property can be filed.</p>	<b>NEEDS/PROBLEMS/COMMENTS:</b>	
			<b><u>CONTINUED FROM 02/17/15</u></b>	
<b>Cont. from 090514, 092314, 121614, 021715</b>			<p>1. Need Account/Report of Administrator and Petition for Final Distribution.</p>	
<b>Aff.Sub.Wit.</b>				
<b>Verified</b>				
<b>Inventory</b>				
<b>PTC</b>				
<b>Not.Cred.</b>				
<b>Notice of Hrg</b>				
<b>Aff.Mail</b>				
<b>Aff.Pub.</b>				
<b>Sp.Ntc.</b>				
<b>Pers.Serv.</b>				
<b>Conf. Screen</b>				
<b>Letters</b>				
<b>Duties/Supp</b>				
<b>Objections</b>				
<b>Video Receipt</b>				
<b>CI Report</b>			<p><b>Reviewed by:</b> JF</p> <p><b>Reviewed on:</b> 04/16/15</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 7 - Tareb</b></p>	
<b>9202</b>				
<b>Order</b>				
<b>Aff. Posting</b>				
<b>Status Rpt</b>				
<b>UCCJEA</b>				
<b>Citation</b>				
<b>FTB Notice</b>				



**8 Martha Celeste Patrick (CONS/PE)**

Case No. 13CEPR01035

Atty Ramirez, Gregory C. (Pro Per – Son – Petitioner)

Atty Torres-Ramirez, Silvia M. (Pro Per – Daughter-in-law – Proposed Co-Conservator)

Atty Kruthers, Heather H. (for Public Guardian – Current Conservator of the Person and Estate)

Atty Rindlisbacher, Curtis D. (Court appointed for Conservatee)

Third Amended Petition for Appointment of Successor Probate Conservator of  
the Person and Estate (Probate Co. 1820, 1821, 2680-2682)

See petition for details.			<b>NEEDS/PROBLEMS/ COMMENTS:</b>  <u>Note:</u> Public Guardian was appointed as Conservator of the Person and Estate on 5/4/14. See Stipulation for Resignation of the Fresno County Public Guardian Effective on Appointment of Gregory Ramirez and Silvia M. Torres-Ramirez as Co-Conservators filed 2-17-15 and Order Accepting Resignation of Public Guardian filed 2-19-15.  Court Investigator advised rights on 11/26/14.  Voting rights affected – need minute order.  1. Petitioners request appointment without bond; however, pursuant to Cal. Rules of Court 7.207, every conservator of the estate must furnish bond including reasonable amount for cost of recovery. Examiner calculates bond should be fixed at \$27,566.12.  <u>Note:</u> The Court will set a status hearing for the filing of the final account of the Public Guardian as appropriate.
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail	W	
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
✓	Conf. Screen		
✓	Letters		
✓	Duties/Supp		
	Objections		
✓	Video Receipt		
	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed by: skc
			Reviewed on: 4/16/15
			Updates:
			Recommendation:
			File 8B – Patrick

Attorney Ruiz, Richard A. (for Rose Hess – Petitioner)  
 Mother Weikel, Jennifer  
 Father Phillips, Robert

## Status Hearing Re: Court Trial

		<b>ROSE HESS</b> , Paternal Great-Grandmother, filed Petition for Appointment of Guardian of Minor on 4/15/14, and was appointed Temporary Guardian <i>ex parte</i> on 4/15/14.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <b>Note:</b> On 3/27/15, Ms. Hess filed a new temporary petition, which was heard on 4/7/15 and continued to 5/5/15.
<b>Cont. from</b>		<b>JENNIFER WEIKEL</b> , Mother, filed an objection on 4/25/14.	
<b>Aff.Sub.Wit.</b>			
<b>Verified</b>		<b>ROBERT PHILLIPS</b> , Father, filed an objection on 4/30/14, but later signed a consent and waiver of notice, which was filed 7/18/14.	
<b>Inventory</b>			
<b>PTC</b>		At hearing on the temporary guardianship petition on 5/1/14, the matter was set for Court Trial. Ms. Hess' temporary guardianship letters were extended at further hearings.	
<b>Not.Cred.</b>			
<b>Notice of Hrg</b>		On 9/26/14, the Court terminated the temporary guardianship, made various orders, including visitation orders for Ms. Hess, and the matter was set for Court Trial on 11/18/14.	
<b>Aff.Mail</b>			
<b>Aff.Pub.</b>		<b>At the continued Court Trial on 3/24/15, the Court set status hearing re reconsideration of temporary orders for 4/7/15 and also set this hearing on 4/21/15 for status re trial.</b>	
<b>Sp.Ntc.</b>			
<b>Pers.Serv.</b>			
<b>Conf. Screen</b>			
<b>Letters</b>			
<b>Duties/Supp</b>			
<b>Objections</b>			
<b>Video Receipt</b>			
<b>CI Report</b>			
<b>9202</b>			
<b>Order</b>			
<b>Aff. Posting</b>			
<b>Status Rpt</b>			
<b>UCCJEA</b>			
<b>Citation</b>			
<b>FTB Notice</b>			
		<b>Reviewed by:</b> skc	
		<b>Reviewed on:</b> 4/16/15	
		<b>Updates:</b>	
		<b>Recommendation:</b>	
		<b>File 9 - Phillips</b>	

Attorney

Marshall, Jared C

Probate Status Hearing

Probate Status Hearing Proof of Bond

		<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><b>OFF CALENDAR</b></p> <p>Increased bond filed 3/5/15 Receipt for blocked account filed 4/15/15</p>
Cont. from		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
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Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		<p>Reviewed by: skc</p> <p>Reviewed on: 4/16/15</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 10 - Alvarez</p>

## Amended Petition to Determine Succession to Real Property

<b>DOD: 3-14-14</b>		<b>FLORINE FURLOW</b> , Companion and sole beneficiary pursuant to the Decedent's will, is Petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
<b>Cont. from 030315</b>		40 days since DOD	<p><b>Continued from 3-3-15. Nothing further has been filed. The following issues remain noted:</b></p> <ol style="list-style-type: none"> <li>1. The original will has not been deposited with the Court pursuant to Probate Code §8200. Need original will.</li> <li>2. The decedent's will is not self-proving. Although the will is not being admitted to probate, this summary proceeding does necessarily include a determination of validity of the will. See Probate Code §13151 and commentary. The Court may require Proof of Subscribing Witness (Form DE-131).</li> <li>3. Petitioner, who is the sole beneficiary according to the will, is one of the subscribing witnesses. It is unclear if there are two other witnesses, or just one (illegible). The Court may require the Proof of Subscribing Witness to be signed by one of the other witnesses, and may also require clarification with regard to the presumption of undue influence as described in Probate Code §6112.</li> <li>4. Petition is incomplete at #9a (1) and (2). Was the decedent survived by a spouse or no spouse? If no spouse, was the decedent divorced or never married, or is the spouse deceased? If the spouse is deceased, need date of death per Local Rule 7.1.1.D.</li> <li>5. Petition is incomplete at #9a(5) and (6) as to whether the decedent was survived by any children. <u>Note:</u> The decedent's will indicates that he had at least one daughter, Diana Moore, who is entitled to notice. All children should be listed at Attachment 14. See below.</li> </ol> <p style="text-align: center;"><b><u>SEE PAGE 2</u></b></p>
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>	<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/>	<b>Verified</b>		
<input type="checkbox"/>	<b>Inventory</b>		
<input type="checkbox"/>	<b>PTC</b>		
<input type="checkbox"/>	<b>Not.Cred.</b>		
<input type="checkbox"/>	<b>Notice of Hrg</b>	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	<b>Aff.Mail</b>	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	<b>Aff.Pub.</b>		
<input type="checkbox"/>	<b>Sp.Ntc.</b>		
<input type="checkbox"/>	<b>Pers.Serv.</b>		
<input type="checkbox"/>	<b>Conf. Screen</b>		
<input type="checkbox"/>	<b>Letters</b>		
<input type="checkbox"/>	<b>Duties/Supp</b>		
<input type="checkbox"/>	<b>Objections</b>		
<input type="checkbox"/>	<b>Video Receipt</b>		
<input type="checkbox"/>	<b>CI Report</b>		
<input type="checkbox"/>	<b>9202</b>		
<input checked="" type="checkbox"/>	<b>Order</b>		
<input type="checkbox"/>	<b>Aff. Posting</b>		
<input type="checkbox"/>	<b>Status Rpt</b>		
<input type="checkbox"/>	<b>UCCJEA</b>		
<input type="checkbox"/>	<b>Citation</b>		
<input type="checkbox"/>	<b>FTB Notice</b>		
<b>Reviewed by:</b> skc			
<b>Reviewed on:</b> 4-16-15			
<b>Updates:</b>			
<b>Recommendation:</b>			
<b>File 11 - Moore</b>			

## Page 2

6. Need Attachment 11, which should contain the legal description of the real property, a description of the personal property, and state the decedent's interest in each.  
  
Note: There is a page stapled to the petition, after the will, that lists assets, but it is unclear if this is an attachment to the will, or if this is meant to be Attachment 11. Regardless, it does not state the decedent's interest in the assets. Petitioner states at #15 that she is a "tenant in common," which indicates that the decedent did not own the property in its entirety. What was the decedent's interest in the real property and the other assets?
7. Petition is incomplete at #13 – it only states the legal description of the real property. Need specific property interest of the real and personal property claimed by Petitioner.
8. Need Attachment 14, which should contain the names, ages, and addresses of all persons named in #1, #9, and #10, which would include the petitioner and the decedent's relatives (spouse, if any, children, and dates of death if deceased).
9. Petition is incomplete at #15. The named alternate executor, Mary Price, should be listed here, and is entitled to notice.
10. Petitioner states at #16 that she is the trustee of a trust that is a devisee under the decedent's will. That does not appear to be the case. The Court may require clarification.
11. Need Notice of Hearing.
12. Need proof of service of Notice of Hearing at least 15 days prior to the hearing pursuant to Probate Code §13153 on:
  - Diana Moore (Daughter, per the decedent's will)
  - Mary Price (Named Alternate Executor)
  - Any other relatives pursuant to issues noted above.

Atty Rusca, Rosemarie (for Petitioner/maternal aunt, Rebecca Kerr  
 Atty Brewer, Ronnie T. (Pro Per – Competing Co- Petitioner)  
 Atty Cunningham, Nikole E. (for Margaret Sanders – Competing Co-Petitioner)

## Status Hearing Re: Settlement Agreement

		<b>TEMP EXPIRED 1/30/15</b>	<b>NEEDS/PROBLEMS/COMMENTS:</b>
		<b>History:</b> Competing petitions for guardianship were filed by <b>REBECCA KERR</b> , Maternal Aunt, and by <b>RONNIE BREWER and MARGARET SANDERS</b> , Step-father and Paternal Grandmother.	<p><b>Note:</b> Ronnie Brewer and Margaret Sanders originally petitioned together, in pro per. However, Ms. Sanders is now represented individually by Attorney Nikole Cunningham.</p> <p>1. Need Settlement Agreement and Order Appointing Guardian if appropriate, or written status report pursuant to Local Rule 7.5.</p>
Aff.Sub.Wit.		Temporary Guardianship was granted to <b>RONNIE BREWER and MARGARET SANDERS</b> on 11/5/14 and extended to the date set for the Court Trial 1/30/15 per Minute Order 12/19/15.	
Verified		Court Trial was continued to 3/24/15 pursuant to Stipulation filed 1/29/15, but neither the Stipulation nor Minute Order 1/30/15 addressed extension of the temporary guardianship. Minute Order 3/24/15 set this status hearing, but also did not address extension of the temporary guardianship.	
Inventory			
PTC			
Not.Cred.			
Notice of Hrg			
Aff.Mail			
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			
			Reviewed by: skc
			Reviewed on: 4/17/15
			Updates:
			Recommendation:
			File 12 - Sanders

Guardian/maternal grandmother  
 Petitioner/paternal grandmother

Maria E. Avitia Perez  
 Maria J. Recinos Pacheco

## Petition for Visitation

		<b>MARIA J. RECINOS PACHECO</b> , paternal grandmother, is petitioner.  <b>MARIA E. AVITIA PEREZ</b> , maternal grandmother, was appointed guardian on 2/5/15.  Please see petition for details.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <u><b>This petition is as to LINDA V. GOMEZ only.</b></u>  1. Need Notice of Hearing. – <u>Note:</u> proof of personal service of the Notice of Hearing and the Petition showing service on Marie E. Avitia Perez was filed on 3/26/15 however the actual Notice of Hearing has not been filed.
Cont. from			
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
	Notice of Hrg		
	Aff.Mail		
	Aff.Pub.		
	Sp.Ntc.		
✓	Pers.Serv.		
	Conf. Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed by: KT Reviewed on: 4/17/15 Updates: Recommendation: File 13 – Avitia & Gomez

Atty Staunton, Cynthia Ann (Pro Per – Beneficiary – Petitioner)

Atty Buettner, Michael M. (for Joseph J. Marzullo – Trustee – Respondent)

## Petition to Compel Account

Marguerite N. Marzullo DOD: 4-11-98		CYNTHIA ANN STAUNTON, Beneficiary, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
		Petitioner states she is a beneficiary of the Marzullo Revocable Living Trust dated 5-19-97 created by Joseph J. Marzullo, Jr., and Marguerite N. Marzullo, as settlors and trustees, as amended by the first and second amendments, both dated 5-19-97. Attached may not be a complete copy, only what she was given.	Minute Order 3-4-15: The Court directs that a complete copy of the trust be provided to the petitioner. The Court will continue this matter one more time. If the procedural issues listed on the examiner notes as of 1-21-15 are not corrected, the Court will deny the petition without prejudice.
Cont from 012115, 030415		Petitioner states she has made countless attempts to request a full and complete accounting, but the Trustee never provided Petitioner with any information regarding the trust estate. Petitioner is entitled to an account pursuant to §16062(a). Petitioner and her son are beneficiaries to whom as stated previous cannot at this time state under these codes what they are entitled to, however as the court to help us in this process. The trustee became the trustee as a result of the death of the surviving settlor [sic] Marguerite N. Marzullo on 4-11-98. Soon, she will have gone through 17 years of this and with his knowledge of Petitioner's finances and having no means to seek even the smallest amount of legal representation, advice, etc., and all these years with nothing.	The following issues remain:  1. Need proof of service of Notice of Hearing at least 30 days prior to the hearing pursuant to Probate Code §17203 on the trustee and all beneficiaries: - Darrell Jordan (named alternate successor trustee) - Any other person entitled to notice pursuant to §17203.  Note: Petitioner listed only the trustee and beneficiaries in the petition; however, the trust provides the name of the alternate successor trustee, who is entitled to notice. The Court may require a complete list compiled and verified by Petitioner of all entitled to notice of these proceedings.
<input type="checkbox"/>	Aff.Sub.Wit.	2. The trust at Article VII, Section 7.6, states: During the time that either Settlor serves as Trustee hereunder no account shall be required of said Settlor serving as Trustee, such accounting being specifically waived in such instance by the Settlers.	The Court may require clarification or authority regarding Petitioner's request for an accounting. (Do the amendments referenced provide further direction?)
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory	3. This petition was filed with a fee waiver. If Petitioner receives distribution, filing fees may be due.	Reviewed by: skc
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.	Reviewed on: 4-16-15	Updates:
<input checked="" type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail	Recommendation:	File 14 - Marzullo
<input type="checkbox"/>	w/o		
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input checked="" type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input type="checkbox"/>	Order	x	
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		

**Petitioner prays for an order:**

1. Finding that notice of hearing has been given as required by law;
2. Compelling the trustee to deliver an account of the transactions of the trust to Petitioner by as soon as Court orders; and
3. For such other and further orders as the Court deems just and proper.

**See Page 2.**



Page 2

**Response filed 1-16-15 by Joseph J. Marzullo, Trustee, states** he is not required to account for the period when the trust may be revoked. One of the subtrusts is the survivor's trust, and accordingly, no accounting need be made to Petitioner with respect to the survivor's Trust. Mr. Marzullo states he is the current beneficiary and sole trustee; therefore, no account is required. Also, Petitioner has failed to comply with notice provisions of § 17203. He and Petitioner have had an estranged relationship for many years. Petitioner has been verbally abusive to Respondent and has made threats against him. In spite of this, Respondent has provided considerable financial assistance to Petitioner over the years.

**Respondent prays that:**

1. The Court deny the relief requested in the petition;
2. That Petitioner take nothing by way of her petition;
3. Such other and additional relief as the court deems appropriate.

**Petition for Appointment of Guardian of the Person (Prob. C. 1510)**

<b>Age: 11</b>		<b><u>NO TEMPORARY IN PLACE</u></b>		<b>NEEDS/PROBLEMS/COMMENTS:</b>	
		<b>STAVROS KISKIRAS</b> , step-father, is Petitioner.		<b><u>CONTINUED FROM 03/09/15</u></b>	
		Father: <b>ANTHONY JYNES, SR.</b> – personally served on 02/13/15 and 04/14/15		1. Need proof of service by mail at least 15 days before the hearing of Notice of Hearing with a copy of the <i>Petition for Appointment of Guardian of the Person</i> or Consent & Waiver of Notice or Declaration of Due Diligence for:	
<b>Cont. from 030915</b>		Mother: <b>TANYA STEWART</b> – Personally served on 02/05/15 and 04/16/15		a. Paternal grandparents (see note)	
	<b>Aff.Sub.Wit.</b>	Paternal grandparents: UNKNOWN		b. Maternal grandparents (see note)	
✓	<b>Verified</b>	Maternal grandparents: UNKNOWN		<b>Note:</b> Proofs of service filed 04/17/15 show service to:	
	<b>Inventory</b>	Sibling: ELENI KISKIRAS		a. Joe Beskaklio	
	<b>PTC</b>	<b>Petitioner states</b> the mother has mental health issues and cannot care for Anthony. Petitioner states that he plans to continue to provide a safe and loving home and continue to ensure that his needs are being met.		b. Carmen Beskaklio	
	<b>Not.Cred.</b>	<b>Court Investigator JoAnn Morris filed a report on 03/04/15.</b>		c. Glora Jynes	
✓	<b>Notice of Hrg</b>			d. Treonte Williams	
✓	<b>Aff.Mail</b>			e. Larry Stewart	
	<b>Aff.Pub.</b>			However, it is unclear what relationship these people are to the minor. Need clarification.	
	<b>Sp.Ntc.</b>				
✓	<b>Pers.Serv.</b>			<b>Reviewed by:</b> JF	
✓	<b>Conf. Screen</b>			<b>Reviewed on:</b> 04/16/15	
✓	<b>Letters</b>			<b>Updates:</b> 04/20/15	
✓	<b>Duties/Supp</b>			<b>Recommendation:</b>	
	<b>Objections</b>			<b>File 15 - Jynes</b>	
	<b>Video Receipt</b>				
✓	<b>CI Report</b>				
	<b>9202</b>				
✓	<b>Order</b>				
	<b>Aff. Posting</b>				
	<b>Status Rpt</b>				
✓	<b>UCCJEA</b>				
	<b>Citation</b>				
	<b>FTB Notice</b>				

**16A James Lockhart, Isaiah Lockhart, Skyla Lockhart, Coreatha Lockhart  
(GUARD/P) Case No. 14CEPR01172**

**Atty Smith, Everlener (pro per – paternal great aunt/Petitioner)**

**Petition for Appointment of Guardian of the Person (Prob. C. 1510)**

James, 7	<b><u>NO TEMPORARY IN PLACE</u></b>		<b>NEEDS/PROBLEMS/COMMENTS:</b>
Isaiah, 4	<b>EVERLENER SMITH</b> , paternal great-aunt, is Petitioner.		<b><u>CONTINUED FROM 03/03/15</u></b>
Skyla, 2	Father: <b>JAMES LOCKHART, JR.</b> – <i>currently incarcerated; served by mail on 01/05/15 and 04/05/15</i>		<b>This Petition pertains to Skyla only.</b>
Coreatha, 1 year	Mother: <b>APRIL SERNA</b> - <i>served by mail on 01/05/15</i>		1. Need proof of service at least 15 days before the hearing of <i>Notice of Hearing</i> with a copy of the <i>Petition for Appointment of Guardian of the Person</i> <u>or</u> Consent & Waiver of Notice <u>or</u> Declaration of Due Diligence for:
Cont. from 030315	Paternal grandfather: JAMES LOCKHART, SR. – <i>served by mail on 03/18/15</i>		a. James Lockhart, Jr. (father) – personal service required
Aff.Sub.Wit.	Paternal grandmother: UNKNOWN		b. April Serna (mother) – personal service required
✓ Verified	Maternal grandfather: AMOS REED – <i>served by mail on 03/18/15</i>		c. Paternal grandmother – service by mail sufficient
Inventory	Maternal grandmother: TERESSA SERNA – <i>served by mail on 03/18/15</i>		
PTC	<b>Petitioner states</b> [see Petition for details].		<b><u>Note:</u></b> Proof of service filed 01/06/15 states that the parents were served by mail on 01/05/15 (father also served by mail on 04/05/15); however, service by mail is insufficient for the parents, personal service is required for the parents
Not.Cred.	<b>Court Investigator Dina Calvillo filed a report on 02/24/15.</b>		
✓ Notice of Hrg			
✓ Aff.Mail	w/		
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.	x		
✓ Conf. Screen			
✓ Letters			
✓ Duties/Supp			
Objections			
Video Receipt			
✓ CI Report			
9202			
✓ Order			
Aff. Posting			
Status Rpt			
✓ UCCJEA			
Citation			
FTB Notice			
			<b>Reviewed by:</b> JF
			<b>Reviewed on:</b> 04/16/15
			<b>Updates:</b>
			<b>Recommendation:</b>
			<b>File 16A - Lockhart</b>

**16A**

**16B James Lockhart, Isaiah Lockhart, Skyla Lockhart, Coreatha Lockhart  
(GUARD/P) Case No. 14CEPR01172**

**Atty Jones, Rita (pro per – paternal great-aunt/Petitioner)**

**Petition for Appointment of Guardian of the Person (Prob. C. 1510)**

James, 7	<b>TEMPORARY EXPIRES 04/21/15</b>		<b>NEEDS/PROBLEMS/COMMENTS:</b>
Isaiah, 4	RITA JONES, paternal great-aunt, is Petitioner.		<b>This Petition pertains to Coreatha only.</b>  2. Need proof of service at least 15 days before the hearing of Notice of Hearing with a copy of the Petition for Appointment of Guardian of the Person <u>or</u> Consent & Waiver of Notice <u>or</u> Declaration of Due Diligence for: d. James Lockhart, Jr. (father) – personal service required e. April Serna (mother) – personal service required f. Paternal grandmother – service by mail sufficient  <b>Note:</b> Proof of service filed 01/06/15 states that the parents were served by mail on 01/05/15 (father also served by mail on 04/05/15); however, service by mail is insufficient for the parents, personal service is required for the parents
Skyla, 2	Father: <b>JAMES LOCKHART, JR.</b> – currently incarcerated; served by mail on 01/05/15 and 04/05/15		
Coreatha, 1 year	Mother: <b>APRIL SERNA</b> - served by mail on 01/05/15		
<b>Cont. from 030315</b>			
<input type="checkbox"/> Aff.Sub.Wit.	Paternal grandfather: JAMES LOCKHART, SR. – served by mail on 03/18/15		
<input checked="" type="checkbox"/> Verified	Paternal grandmother: UNKNOWN		
<input type="checkbox"/> Inventory	Maternal grandfather: AMOS REED – served by mail on 03/18/15		
<input type="checkbox"/> PTC	Maternal grandmother: TERESSA SERNA – served by mail on 03/18/15		
<input type="checkbox"/> Not.Cred.	<b>Petitioner states</b> [see Petition for details].		
<input checked="" type="checkbox"/> Notice of Hrg	<b>Court Investigator Jennifer Young filed a report on 02/23/15.</b>		
<input checked="" type="checkbox"/> Aff.Mail			
<input type="checkbox"/> Aff.Pub.			
<input type="checkbox"/> Sp.Ntc.			
<input type="checkbox"/> Pers.Serv.	x		
<input checked="" type="checkbox"/> Conf. Screen			
<input checked="" type="checkbox"/> Letters			
<input checked="" type="checkbox"/> Duties/Supp			
<input type="checkbox"/> Objections			
<input type="checkbox"/> Video Receipt			
<input checked="" type="checkbox"/> CI Report			
<input type="checkbox"/> 9202			
<input checked="" type="checkbox"/> Order			
<input type="checkbox"/> Aff. Posting			
<input checked="" type="checkbox"/> Status Rpt			
<input type="checkbox"/> UCCJEA			
<input type="checkbox"/> Citation			
<input type="checkbox"/> FTB Notice			
			<b>Reviewed by:</b> JF
			<b>Reviewed on:</b> 04/16/15
			<b>Updates:</b>
			<b>Recommendation:</b>
			<b>File 16B - Lockhart</b>

**16B**

**16C James Lockhart, Isaiah Lockhart, Skyla Lockhart, Coreatha Lockhart  
(GUARD/P) Case No. 14CEPR01172**

**Atty McGee, Mary (pro per – paternal great-aunt/Petitioner)**

**Petition for Appointment of Guardian of the Person (Prob. C. 1510)**

James, 7	<b><u>NO TEMPORARY IN PLACE</u></b>		<b>NEEDS/PROBLEMS/COMMENTS:</b>
Isaiah, 4	<b>MARY MCGEE</b> , paternal great-aunt, is Petitioner.		
Skyla, 2	Father: <b>JAMES LOCKHART, JR.</b> – currently incarcerated; served by mail on 01/05/15		<p><b>This Petition pertains to James and Isaiah only.</b></p> <p>3. Need proof of service at least 15 days before the hearing of Notice of Hearing with a copy of the Petition for Appointment of Guardian of the Person <u>or</u> Consent &amp; Waiver of Notice <u>or</u> Declaration of Due Diligence for:</p> <ul style="list-style-type: none"> <li>g. James Lockhart, Jr. (father) – personal service required</li> <li>h. April Serna (mother) – personal service required</li> <li>i. Paternal grandmother – service by mail sufficient</li> </ul> <p><b>Note:</b> Proof of service filed 01/06/15 states that the parents were served by mail on 01/05/15; however, service by mail is insufficient for the parents, personal service is required for the parents</p>
Coreatha, 1 year	Mother: <b>APRIL SERNA</b> - served by mail on 01/05/15		
<b>Cont. from 030315</b>			
<input type="checkbox"/> Aff.Sub.Wit.			
<input checked="" type="checkbox"/> Verified			
<input type="checkbox"/> Inventory			
<input type="checkbox"/> PTC			
<input type="checkbox"/> Not.Cred.			
<input checked="" type="checkbox"/> Notice of Hrg			
<input checked="" type="checkbox"/> Aff.Mail	w/		
<input type="checkbox"/> Aff.Pub.			
<input type="checkbox"/> Sp.Ntc.			
<input type="checkbox"/> Pers.Serv.	x		
<input checked="" type="checkbox"/> Conf. Screen			
<input checked="" type="checkbox"/> Letters			
<input checked="" type="checkbox"/> Duties/Supp			
<input type="checkbox"/> Objections			
<input type="checkbox"/> Video Receipt			
<input checked="" type="checkbox"/> CI Report			
<input type="checkbox"/> 9202			
<input checked="" type="checkbox"/> Order			
<input type="checkbox"/> Aff. Posting			
<input type="checkbox"/> Status Rpt			
<input checked="" type="checkbox"/> UCCJEA			
<input type="checkbox"/> Citation			
<input type="checkbox"/> FTB Notice			
<p>Paternal grandfather: JAMES LOCKHART, SR. – served by mail on 03/18/15</p> <p>Paternal grandmother: UNKNOWN</p> <p>Maternal grandfather: AMOS REED – served by mail on 03/18/15</p> <p>Maternal grandmother: TERESSA SERNA – served by mail on 03/18/15</p> <p><b>Petitioner states</b> [see Petition for details].</p> <p><b>Court Investigator Samantha Henson filed a report on 02/23/15.</b></p>			
			<p><b>Reviewed by:</b> JF</p> <p><b>Reviewed on:</b> 04/16/15</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 16C - Lockhart</b></p>

**16C**

## Petition for Appointment of Guardian of the Person (Prob. C. 1510)

17

Petitioner Sandoval, Angela

Petition for Appointment of Guardian of the Person (Prob. C. 1510)

		<p><b>THERE IS NO TEMPORARY.</b> Temporary was denied on 3/4/15.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p>Matter not reviewed. This court does not have jurisdiction.</p>
		<p><b>ANGELIA SANDOVAL</b>, non-relative, is petitioner.</p>	
Cont. from		<p>Please see petition for details.</p>	
Aff.Sub.Wit.			
Verified		<p>Court Investigator Report filed on 3/30/15</p>	
Inventory			
PTC			
Not.Cred.			
Notice of Hrg			
Aff.Mail			
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			
		<p>Reviewed by: KT</p>	
		<p>Reviewed on: 4/17/15</p>	
		<p>Updates:</p>	
		<p>Recommendation:</p>	
		<p>File 18 – Sandoval Soloman</p>	

Attorney Joseph H. Boyd (for Petitioner Maria Arzate)

Petition for Letters of Administration; Authorization to Administer Under IAEA (Prob. C. 8002, 10450)

<b>DOD: 5/9/14</b>		<p><b>MARIA AZARTE</b>, spouse, is petitioner and requests appointment as Administrator without bond.</p> <p>All heirs waive bond.</p> <p>Full IAEA – o.k.</p> <p>Decedent died intestate.</p> <p>Residence: Kerman Publication: Kerman News</p> <p>Estimated value of the estate: Real property - \$38,000.00</p> <p>Probate Referee: Steven Diebert</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p>1. Need Order</p> <p><b>Note:</b> If the petition is granted, status hearings will be set as follows:</p> <ul style="list-style-type: none"> <li><b>Wednesday, September 23, 2015</b> at 9:00 a.m. in Department 303, for the filing of the inventory and appraisal.</li> <li><b>Wednesday, June 22, 2016</b> at 9:00 a.m. in Department 303, for the filing of the first account or petition for final distribution.</li> </ul> <p>Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior the date set the status hearing will come off calendar and no appearance will be required.</p>	
<b>Cont. from</b>				
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>			
<input checked="" type="checkbox"/>	<b>Verified</b>			
<input type="checkbox"/>	<b>Inventory</b>			
<input type="checkbox"/>	<b>PTC</b>			
<input type="checkbox"/>	<b>Not.Cred.</b>			
<input type="checkbox"/>	<b>Notice of Hrg</b>			
<input checked="" type="checkbox"/>	<b>Aff.Mail</b>			W/O
<input checked="" type="checkbox"/>	<b>Aff.Pub.</b>			
<input type="checkbox"/>	<b>Sp.Ntc.</b>			
<input type="checkbox"/>	<b>Pers.Serv.</b>			
<input type="checkbox"/>	<b>Conf. Screen</b>			
<input checked="" type="checkbox"/>	<b>Letters</b>			
<input checked="" type="checkbox"/>	<b>Duties/Supp</b>			
<input type="checkbox"/>	<b>Objections</b>			
<input type="checkbox"/>	<b>Video Receipt</b>			
<input type="checkbox"/>	<b>CI Report</b>			
<input type="checkbox"/>	<b>9202</b>			
<input checked="" type="checkbox"/>	<b>Order</b>			
<input type="checkbox"/>	<b>Aff. Posting</b>			
<input type="checkbox"/>	<b>Status Rpt</b>			
<input type="checkbox"/>	<b>UCCJEA</b>			
<input type="checkbox"/>	<b>Citation</b>			
<input type="checkbox"/>	<b>FTB Notice</b>			

<b>Reviewed by: KT</b>
<b>Reviewed on: 4/17/15</b>
<b>Updates:</b>
<b>Recommendation:</b>
<b>File 19 - Arzate</b>



Attorney Phillip B. Laird, Jr., Dowling Aaron Inc., Visalia (for Petitioners Thomas B. Finley and Tamara Owens)

**Petition to Determine Succession to Real Property (Prob. C. 13151)**

<b>DOD: 11/14/2014</b>		<b>THOMAS B. FINLEY</b> and <b>TAMARA OWENS</b> , children, are Petitioners.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
		40 days since DOD	
<b>Cont. from</b>			
	<b>Aff.Sub.Wit.</b>	No other proceedings	
✓	<b>Verified</b>		
✓	<b>Inventory</b>	I & A - <b>\$96,500.00</b>	
	<b>PTC</b>		
	<b>Not.Cred.</b>	Decedent died intestate.	
	<b>Notice of Hrg</b>	N/A	
	<b>Aff.Mail</b>	<b>Petitioners request</b> Court determination	
	<b>Aff.Pub.</b>	that Decedent's <b>100%</b> interest in real	
	<b>Sp.Ntc.</b>	property located at 214 S. Quince, Exeter,	
	<b>Pers.Serv.</b>	passes to the Petitioners at <b>50%</b> each	
	<b>Conf. Screen</b>	pursuant to intestate succession.	
	<b>Letters</b>		
	<b>Duties/Supp</b>		
	<b>Objections</b>		
	<b>Video Receipt</b>		
	<b>CI Report</b>		
	<b>9202</b>		
✓	<b>Order</b>		
	<b>Aff. Posting</b>		<b>Reviewed by:</b> LEG
	<b>Status Rpt</b>		<b>Reviewed on:</b> 4/17/15
	<b>UCCJEA</b>		<b>Updates:</b>
	<b>Citation</b>		<b>Recommendation:</b> SUBMITTED
	<b>FTB Notice</b>		<b>File 20 - Finley</b>

Petitioner Diana Garcia, daughter (Pro Per)

Petitioner Daniel Garcia, son (Pro Per)

## Petition to Determine Succession to Real Property (Prob. C. 13151)

DOD: 9/12/2014		DIANA GARCIA and DANIEL KELLOGG, children, are Petitioners.	NEEDS/PROBLEMS/COMMENTS:
Cont. from		40 days since DOD	1. <i>Attachment 11</i> to the <i>Petition</i> does not state the amount of the Decedent's interest in the real property as required per Item 11 of the <i>Petition</i> .
	Aff.Sub.Wit.		
✓	Verified		
✓	Inventory		
	PTC	No other proceedings	
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail		
	Aff.Pub.	I & A - \$100,000.00	
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
	Letters	Decedent died intestate.	
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report	<b>Petitioners request</b> Court determination that Decedent's <b>[unspecified %]</b> interest in real property located at 2153 Norris Drive West, passes to the Petitioners at <b>50%</b> each pursuant to intestate succession.	
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		Reviewed by: LEG
	UCCJEA		Reviewed on: 4/17/15
	Citation		Updates:
	FTB Notice		Recommendation:
			File 20 - Finley

**22 Marilyn June Dedmon (Def Succ)**

Case No. 15CEPR00247

Fulmer, William (Pro Per – Son – Petitioner)

Lapsley, Suzy (Pro Per – Daughter – Petitioner)

Dedmon, Alice (Pro Per – Daughter – Petitioner)

Lear, Michelle (Pro Per – Daughter – Petitioner)

**Petition to Determine Succession to Real Property (Prob. C. 13151)**

<b>DOD: 4/11/13</b>	<b>WILLIAM FULMER, SUZY LAPSLEY, ALICE DEDMON, and MICHELLE LEAR, Children,</b> are Petitioners.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  1. <b>Need Attachment 11, which should contain the legal description of the real property and state the decedent's interest in the real property.</b>										
	40 days since DOD											
	I&A: \$130,000.00 (real property located at 925 W. National in Clovis)	<table border="1"> <tr><td colspan="2"><b>Reviewed by:</b> skc</td></tr> <tr><td colspan="2"><b>Reviewed on:</b> 4/17/15</td></tr> <tr><td colspan="2"><b>Updates:</b></td></tr> <tr><td colspan="2"><b>Recommendation:</b></td></tr> <tr><td colspan="2"><b>File 22 - Dedmon</b></td></tr> </table>	<b>Reviewed by:</b> skc		<b>Reviewed on:</b> 4/17/15		<b>Updates:</b>		<b>Recommendation:</b>		<b>File 22 - Dedmon</b>	
<b>Reviewed by:</b> skc												
<b>Reviewed on:</b> 4/17/15												
<b>Updates:</b>												
<b>Recommendation:</b>												
<b>File 22 - Dedmon</b>												
	Decedent died intestate											
<input type="checkbox"/> <b>Aff.Sub.Wit.</b>	Petitioners request Court determination that the Decedent's real property passes to them in undivided 1/4 interests each.											
<input checked="" type="checkbox"/> <b>Verified</b>												
<input type="checkbox"/> <b>Inventory</b>												
<input type="checkbox"/> <b>PTC</b>												
<input type="checkbox"/> <b>Not.Cred.</b>												
<input type="checkbox"/> <b>Notice of Hrg</b>												
<input type="checkbox"/> <b>Aff.Mail</b>												
<input type="checkbox"/> <b>Aff.Pub.</b>												
<input type="checkbox"/> <b>Sp.Ntc.</b>												
<input type="checkbox"/> <b>Pers.Serv.</b>												
<input type="checkbox"/> <b>Conf. Screen</b>												
<input type="checkbox"/> <b>Letters</b>												
<input type="checkbox"/> <b>Duties/Supp</b>												
<input type="checkbox"/> <b>Objections</b>												
<input type="checkbox"/> <b>Video Receipt</b>												
<input type="checkbox"/> <b>CI Report</b>												
<input type="checkbox"/> <b>9202</b>												
<input checked="" type="checkbox"/> <b>Order</b>												
<input type="checkbox"/> <b>Aff. Posting</b>												
<input type="checkbox"/> <b>Status Rpt</b>												
<input type="checkbox"/> <b>UCCJEA</b>												
<input type="checkbox"/> <b>Citation</b>												
<input type="checkbox"/> <b>FTB Notice</b>												

**Attorney Thomas A. Markeson (for Petitioners)**

## Petition to Determine Succession to Real Property (Prob. C. 13151)

<b>DOD: 8/24/15</b>		<b>GARY RAY HOGUE, CINDY ANN HOGUE</b> and <b>CHERRY ESQUEDA</b> , children, are petitioners.  40 days since DOD.  No other proceedings.  Decedent died intestate.  I & A                      -                      \$110,000.00  <b>Petitioners request</b> Court determination that Decedent's 100% interest in real property pass to them in equal shares.	<b>NEEDS/PROBLEMS/COMMENTS:</b>	
<b>Cont. from</b>				
	<b>Aff.Sub.Wit.</b>			
✓	<b>Verified</b>			
	<b>Inventory</b>			
	<b>PTC</b>			
	<b>Not.Cred.</b>			
✓	<b>Notice of Hrg</b>			
✓	<b>Aff.Mail</b>			W/
	<b>Aff.Pub.</b>			
	<b>Sp.Ntc.</b>			
	<b>Pers.Serv.</b>			
	<b>Conf. Screen</b>			
	<b>Letters</b>			
	<b>Duties/Supp</b>			
	<b>Objections</b>			
	<b>Video Receipt</b>			
	<b>CI Report</b>			
	<b>9202</b>			
✓	<b>Order</b>			
	<b>Aff. Posting</b>			
	<b>Status Rpt</b>			
	<b>UCCJEA</b>			
	<b>Citation</b>			
	<b>FTB Notice</b>			
<b>Reviewed by: KT</b>				
<b>Reviewed on: 4/17/15</b>				
<b>Updates:</b>				
<b>Recommendation: SUBMITTED</b>				
<b>File 23 - Hogue</b>				

Attorney Christian D. Jinkerson (for Petitioner Annabella Calderon Ibarra)

## Petition for Appointment of Temporary Guardian (Prob. C. §2250)

			<b><u>GENERAL HEARING 6/16/15</u></b>	<b>NEEDS/PROBLEMS/COMMENTS:</b>
			<b>ANABELLA CALDERON IBARRA</b> , minor, is Petitioner.	1. Need proof of personal service, no later than 5 court days prior to the hearing of the Notice of Hearing along with a copy of the temporary petition on: a. Antonio Calderon Mendoza (father) b. Maria Soccorro De Carmen Ibarra Cuevas (mother)
<b>Cont. from</b>			Please see petition for details.	
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>			
<input checked="" type="checkbox"/>	<b>Verified</b>			
<input type="checkbox"/>	<b>Inventory</b>			
<input type="checkbox"/>	<b>PTC</b>			
<input type="checkbox"/>	<b>Not.Cred.</b>			
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>	W/		
<input type="checkbox"/>	<b>Aff.Mail</b>			
<input type="checkbox"/>	<b>Aff.Pub.</b>			
<input type="checkbox"/>	<b>Sp.Ntc.</b>			
<input checked="" type="checkbox"/>	<b>Pers.Serv.</b>			
<input checked="" type="checkbox"/>	<b>Conf. Screen</b>			
<input checked="" type="checkbox"/>	<b>Letters</b>			
<input checked="" type="checkbox"/>	<b>Duties/Supp</b>			
<input type="checkbox"/>	<b>Objections</b>			
<input type="checkbox"/>	<b>Video Receipt</b>			
<input type="checkbox"/>	<b>CI Report</b>			
<input type="checkbox"/>	<b>9202</b>			
<input checked="" type="checkbox"/>	<b>Order</b>			
<input type="checkbox"/>	<b>Aff. Posting</b>			
<input type="checkbox"/>	<b>Status Rpt</b>			
<input checked="" type="checkbox"/>	<b>UCCJEA</b>			
<input type="checkbox"/>	<b>Citation</b>			
<input type="checkbox"/>	<b>FTB Notice</b>			
				<b>Reviewed by: KT</b>
				<b>Reviewed on: 4/17/15</b>
				<b>Updates:</b>
				<b>Recommendation:</b>
				<b>File 24 - Ibarra</b>

Attorney Michael P Dowling (for Petitioner John Patrick Dodds)

## Petition for Probate of Will and for Letters Testamentary

<b>DOD: 8/29/14</b>	<b>JOHN PATRICK DODDS</b> , named alternate executor without bond, is petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  1. Need Order 2. Need Letters  <b>Status hearings were previously set as follows:</b>  • <b>May 27, 2015</b> for the filing of the inventory and appraisal  • <b>March 30, 2016</b> for the filing of the first account or petition for final distribution.
<b>Cont. from</b>	<b>BARBARA JEAN DODDS</b> was appointed as Executor on 1/15/15. <b>BARBARA JEAN DODDS</b> died on 2/17/15 leaving a vacancy.	
<input type="checkbox"/> <b>Aff.Sub.Wit.</b>		
<input checked="" type="checkbox"/> <b>Verified</b>		
<input type="checkbox"/> <b>Inventory</b>	Full IAEA – o.k.	
<input type="checkbox"/> <b>PTC</b>		
<input type="checkbox"/> <b>Not.Cred.</b>	Will dated 4/13/1999 was admitted to probate on 1/5/15	
<input type="checkbox"/> <b>Notice of Hrg</b>		
<input checked="" type="checkbox"/> <b>Aff.Mail</b>	Residence: Fresno Publication: Fresno Business Journal	
<input checked="" type="checkbox"/> <b>Aff.Pub.</b>		
<input type="checkbox"/> <b>Sp.Ntc.</b>		
<input type="checkbox"/> <b>Pers.Serv.</b>	<b>Estimated value of the Estate:</b>	
<input type="checkbox"/> <b>Conf. Screen</b>	Personal property - \$674,157.00	
<input type="checkbox"/> <b>Letters</b>	Annual income - \$4,328.00	
<input checked="" type="checkbox"/> <b>Duties/Supp</b>	<b>Total</b> - <b>\$678,157.00</b>	
<input type="checkbox"/> <b>Objections</b>		
<input type="checkbox"/> <b>Video Receipt</b>		
<input type="checkbox"/> <b>CI Report</b>		
<input type="checkbox"/> <b>9202</b>		
<input type="checkbox"/> <b>Order</b>	X	
<input type="checkbox"/> <b>Aff. Posting</b>		
<input type="checkbox"/> <b>Status Rpt</b>		
<input type="checkbox"/> <b>UCCJEA</b>		
<input type="checkbox"/> <b>Citation</b>		
<input type="checkbox"/> <b>FTB Notice</b>		
		<b>Reviewed by: KT</b>
		<b>Reviewed on: 4/17/15</b>
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 25 - Dodds</b>